Filing ID #10026454

Financial Disclosure Report

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Filer Information

Name: Hon. Rick Larsen
Status: Member
State/District: WA02

Filing Information

Filing Type: Annual Report
Filing Year: 2018
Filing Date: 05/17/2019

Schedule A: Assets and "Unearned" Income

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
AFI Cash Reserve Certificate [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	
Ameriprise Financial One Account/CNL Healthcare Inc (widely diversified property investment fund) [RE]	JT	$1,001 - $15,000	Dividends	$201 - $1,000	
Ameriprise One Financial Account/Corporate Property Associates 18 Global Inc Cl A (widely diversifie [RE]	JT	$1,001 - $15,000	None		
Ameriprise One Financial Account/Wells Fargo Wealthbuilder Growth Balanced [MF]	JT	$15,001 - $50,000	Dividends	$201 - $1,000	
Ameriprise One Financial Account/Western Asset Intermediate Term Municipal Cl C [MF]	JT	$1,001 - $15,000	Dividends	$1 - $200	
DC2/AK Freedom ADV 529 [5P] Location: AK Description: withdrawal to pay for tuition and other qualified expenses	DC	$1,001 - $15,000	None		
Federal Congressional Credit Union/Checking [BA]	JT	$1,001 - $15,000	Interest	$1 - $200	

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > $1,000?
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Condo Property, Everett WA [RP] LOCATION: Everett, WA, US DESCRIPTION: Created Revocable Living Trust on March 18, 2018. Moved Everett property to the RLT on March 27, 2018	JT	$250,001 - $500,000	None		☑
Richard R Larsen IRA/Franklin Square Investment Corporation II [IH] DESCRIPTION: FSIC is a non-traded Business Development Corporation fund		$1,001 - $15,000	None		☐
Richard R Larsen IRA/Industrial Property Trust [RE]		$15,001 - $50,000	None		☐
Richard R Larsen IRA/Wells Fargo WealthBuilder Growth Allocation Class C [MF]		$15,001 - $50,000	None		☐
Richard R Larsen Roth IRA/Wells Fargo Wealthbuilder Equity Class C [MF]		$1,001 - $15,000	None		☐
Richard R Larsen Roth IRA/WP Carey Inc REIT [RE] DESCRIPTION: Corporate Property Associates 17 merged with WP Carey Inc on 11/01/2018		$1,001 - $15,000	None		☑
Riversource indexed universal life insurance/S&P 500 Indexed Account [WU]		$50,001 - $100,000	None		☐
Riversource RAVA 5 Advantage Variable Annuity/VP Moderate Portfolio Class 2 [OT] DESCRIPTION: Annuity that holds mutual fund. Retirement asset		$1,001 - $15,000	None		☐
Tiia Ingrid Karlen Roth IRA/Ameriprise Insured Money Market Account [MF]	SP	$1 - $1,000	None		☐
Tiia Ingrid Karlen Roth IRA/Franklin Square Investment Corporation II [IH] DESCRIPTION: FSIC is a non-traded Business Development Corporation fund	SP	$1,001 - $15,000	None		☐
Tiia Ingrid Karlen Roth IRA/Wells Fargo Wealth Builder Growth Allocation [MF]	SP	$1,001 - $15,000	None		☐
Tiia Ingrid Karlen TSCA/Columbia Contrarian Core Class A [MF]	SP	$15,001 - $50,000	None		☐

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit https://fd.house.gov/reference/asset-type-codes.aspx.

Schedule B: Transactions

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > $200?
DC1/AK Freedom ADV 529 [5P] Location: WA Description: Sale of assets to pay for tuition and qualified expenses.	DC	08/2/2018	S	$1,001 - $15,000	☐
Richard R Larsen and Tiia I Karlen Revocable Living Trust ⇒ Condo Property, Everett WA [RP] Location: Everett, WA, US Description: Created Revocable Living Trust on March 18, 2018. Moved Everett property to the RLT on March 27, 2018	JT	03/27/2018	S	$250,001 - $500,000	☐
Richard R Larsen Roth IRA/Corporate Property Associates 17 Global [RE] Description: WP Carey Inc REIT merged with Corporate Property Associates 17 Global. It was a transaction made by the Fund managers		11/11/2018	E	$1,001 - $15,000	
Richard R Larsen Roth IRA/WP Carey Inc REIT [RE] Description: WP Carey Inc REIT merged with Corporate Property Associates 17 Global. It was a transaction made by the Fund managers		11/11/2018	E	$1,001 - $15,000	
Riversource indexed universal life insurance/S&P 500 Indexed Account [WU] Description: monthly premium for life insurance		Monthly	P	$350.00	

* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit https://fd.house.gov/reference/asset-type-codes.aspx.

Schedule C: Earned Income

None disclosed.

Schedule D: Liabilities

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	BAC Loans	December 2011	Mortgage for secondary residence	$250,001 - $500,000
JT	Everbank	March 2012	Mortgage for primary residence	$3,500.00

Schedule E: Positions

None disclosed.

Schedule F: Agreements

None disclosed.

Schedule G: Gifts

None disclosed.

Schedule H: Travel Payments and Reimbursements

Trip Details					Inclusions		
Source	**Start Date**	**End Date**	**Itinerary**	**Days at Own Exp.**	**Lodging?**	**Food?**	**Family?**
The Aspen Institute	08/15/2018	08/19/2018	Everett, WA - Vancouver, BC - Everett, WA	0	☑	☑	☑

Schedule I: Payments Made to Charity in Lieu of Honoraria

None disclosed.

Schedule A and B Asset Class Details

- Richard R Larsen and Tiia I Karlen Revocable Living Trust (Owner: JT)
  Description: Created Revocable Living Trust on March 18, 2018.

Exclusions of Spouse, Dependent, or Trust Information

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

○ Yes ◉ No

Trusts: Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

○ Yes ◉ No

Exemption: Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

○ Yes ◉ No

Certification and Signature

☑ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

Digitally Signed: Hon. Rick Larsen , 05/17/2019